









Topic: Reports

Related Topics: Workflows Help files: On the top menu bar, click Help - Scroll down alpha list to Reports folder.

Frequently Asked Questions:

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-  Everybody Shelf List - One letter at a time
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-  List and Notice type Reports Print View
-  How to customize Notice Report Overdue user message
-  Average date of Publication - New tab in Schedule New Reports

1. Review reports, do not save reports under MY Titles to templates tab, all reports under My Titles are defaulted to the site by log in credentials

Introduction: Workflows reports are organized in general groups with specific reports types within each group. You can use the reports just as they are, but the power of Workflows reports is the ability to tailor a basic report to meet your own needs. With the upgrade, additional reports have been added, review Circulation tab report New Overdue Notice.

Note: Reports that allow Sort by Zip will read from the address field ROOM.

The power of reports can be over powering. If you have specific information you need extracted, contact Suzette Johnstone 742-6091 or johnstone_suzette@asdk12.org.

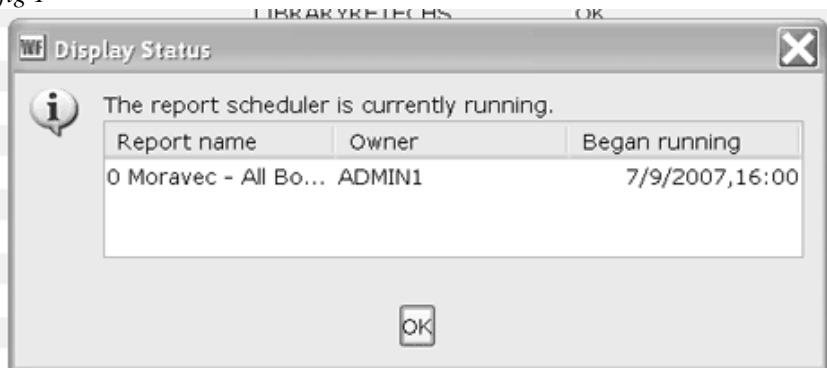
Once a report meeting your basic needs has been selected and formatting decisions have been made, you can use the reports wizards to schedule it to run immediately, or save it as a report template to be run later. Reports can be printed, e-mailed, or viewed and saved as a text file; usually in Word.

Note:

All MARC records and patron records are updated through reports. The reports server runs one report at a time. Most reports run in 2 minutes or less, you can check the status of your report by clicking the icon at the top of finished reports window, Display Report Scheduler Status, Figure 1.

If you schedule a report and the report does not finish within 10 minutes, call Suzette Johnstone with report information: 742-6091.

fig 1



Report Types:

Count

A report of the count type answers the question "How many meet these criteria?" Examples of this type are Count Charges and Count Items.

List

A report of the list type answers the question "Which ones meet these criteria?" This report type is one of the most customizable types of reports at its most basic state; however, many reports are based on a list report with selections and formatting decisions already made. Examples of the list type are List Users and List Items.

Notice

A report of the notice type answers the question "Who needs what information sent to them?" It selects the users to receive the notice and the notice text. Example: Overdue Notice

Schedule New Reports:

1. Click on Schedule New Reports wizard, located under the common tasks tab in the ASDCIRC tool bar.

NOTE: The properties window will open every time if you have not selected the radio button-Never, Review bulletin #01.

2. Schedule New Reports window opens.

3. There are 5 tabs across the top: Templates, Bibliographic, Circulation, Scanner and User.

4. Templates tab opens by default.

5. Select the other tabs to review reports listed within.

a. To review report formats

Click on a report

Click Set up and Schedule

The report opens.

b. The Report has tabs across the top, select each tab and review fields.

6. The Templates tab has saved reports unique to your school, the saved reports (templates) will be formatted to your schools needs. Review report templates to get familiar with the fields and the selection choices previously saved.

Modify or Copy existing reports: Any report can be copied or modified.

- Modify button: An existing report can be modified and saved

Example: An Overdue report can have a date range entered to display patrons with very old overdue.

- Copy button: to create an exact replica of an existing report.

Example: An existing Overdue report can be copied and modified with a new teachers name.

Print Reports: The margin settings can be tweaked to print one notice per page.**

1. On the ASDCIRC common tasks tab select Session Settings

2. The session settings window opens.

3. Default is the only tab available to review settings.

4. Towards the bottom of the window is a box, Format Page, listed below are suggested margin settings.

Character set table - TY-DISP (default do not change)

Page length: 65 (suggested 60)

Page width: 80 (suggested 90)

Top margin: 1 (suggested 1)

Bottom margin: 0 (suggested 1)

5. Click OK,

6. Open a finished notices report, i.e. New Overdue Notice, review all notices to check margin settings, if the margin settings are still creating a bad page break, close report. Repeat set Session Settings with new Format Page numbers. Best practice is changing one format margin at a time.

****NOTE:** If multiple patrons have more than 4 items, the page margins have to be set by a manual method of remove extra lines.

Email a report: To email a finished report,

1. In the finished reports list click on the finished report to highlight

2. At the bottom of the finished report window are several buttons, Click Email.

3. The email window opens, you can enter an email address and or populate a list by clicking on the gadget in the email address field.

The links below are to Adobe files that can be reviewed or printed.


 [How to Modify Reports,](#)

 [Everybody Shelf List - One letter at a time](#)

 [Fiction Shelf report - One letter at a time](#)

 [List and Notice type Reports Print View](#)

 [How to customize Notice Report Overdue user message](#)

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